



March 3, 2025

VIA ELECTRONIC FILING

Ms. Rachel Peterson
CPUC Executive Director
California Public Utilities Commission
505 Van Ness Avenue
San Francisco, CA 94102-3288

Ms. Stephanie Green
Supplier Diversity Program Manager
California Public Utilities Commission
505 Van Ness Avenue
San Francisco, CA 94102-3288

Re: Great Oaks Water Company's General Order 156 Compliance Filing - 2024

Dear Ms. Peterson and Ms. Green:

Pursuant to General Order 156 ("GO 156"), Great Oaks Water Co. (Great Oaks) hereby electronically files its 2024 Annual Report and Annual Plan in compliance with GO 156, Sections 9 and 10.

Please contact us with any questions via email at jliem@greatoakswater.com.

Sincerely,

A handwritten signature in black ink that reads "Juan Liem". The signature is written in a cursive, flowing style.

Juan Liem
Chief Financial Officer
Great Oaks Water Company



2024 ANNUAL REPORT AND ANNUAL PLAN

WOMEN, MINORITY, PERSONS WITH DISABILITIES, AND LGBT OWNED BUSINESS ENTERPRISES

**California Public Utilities Commission
March 1, 2025**



2024 ANNUAL REPORT AND ANNUAL PLAN

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INTRODUCTION DESCRIPTION OF COVERED ENTITY

Great Oaks Water Company has provided public water utility service to the Blossom Valley - Santa Teresa - Edenvale - Coyote Valley- Almaden Valley of the City of San Jose since early 1959. Our dedication to providing the highest quality water, the best customer service, and the lowest rates continues today. With more than 20,000 customers and a dedicated staff of 20 employees, Great Oaks is recognized as one of the most efficiently run utilities in the state.

DESCRIPTION OF SUPPLIER DIVERSITY PROGRAM, DIVERSE SUBCONTRACTING PROGRAM, AND SUPPLIER DIVERSITY-RELATED ACTIVITIES FOR PREVIOUS CALENDAR YEAR

Great Oaks continues to work with The Diversity Advisors (TDA), an experienced, result-driven minority-owned supplier diversity consulting firm, since 2023 to advance its Supplier Diversity Program for the company to be more inclusive of diverse suppliers in the procurement of goods and services. Great Oaks is pleased to see a significant growth of its diverse spend to 6%, as a percentage to the Net Procurement, in the second year of the development of the program. As a member of the California Water Association (CWA), Great Oaks staff intends to be more involved in its Supplier Diversity Committee to expand knowledge and to work collaboratively with other Class A water utilities when opportunities to be connected with diverse suppliers arise.

This year, Great Oaks, in partnership with TDA, is working to implement necessary changes in the procurement processes to drive meaningful results with different stakeholders within the company. In addition, Great Oaks intends to increase the number of engagements with external parties to gather support for its program as the company strives to reflect the communities it serves.

The program framework includes:

- Internal processes/procedures to ensure that diverse suppliers are allowed to submit proposals for procurement bid review.
- Training to ensure internal team members are aware of and understand the “why” behind supplier diversity and fully engage in our commitment to the inclusion of diverse suppliers in all of our procurement efforts
- Outreach programs inclusive of diverse suppliers and community-based organizations

Great Oaks set its goal to continue building its portfolio of diverse suppliers with a common interest of delivering the highest quality of water to all of its customers in its service territory. Great Oaks continues to think of new ideas and develop new programs to support its commitment to increase its diverse spend in the next coming years.

SUPPLIER DIVERSITY PROGRAM WEBSITE ADDRESS AND CONTACT INFORMATION

Great Oaks continued its partnership with TDA, a firm led by individuals with extensive experience collaborating with regulated utilities in California. This partnership entails TDA taking the lead on Great Oaks' supplier diversity initiatives, working in tandem with Great Oaks. For all communication related to this initiative, kindly direct your correspondence to the following two designated contacts:

Great Oaks Water Company
% The Diversity Advisors
14900 Magnolia Blvd. #5722
Sherman Oaks, CA 91403
info@thediversityadvisors.com
Edward Simon
(314) 575-1715

Great Oaks Water Company
20 Great Oaks Blvd., Suite 120
San Jose, CA 95119
Name: Juan Liem
Telephone Number: (408) 227-9540
Email: Jliem@greatoakswater.com

Great Oaks Water Company	2024 of Report
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			[Year] of Report							
			Direct Spend \$	Sub Spend \$	Total \$	%	Product Spend	Service Spend	\$ Total \$	%
1	Minority Male	African American	0	0	0	0	0	0	0	0
2		Asian Pacific American	101106	5,18	101105	5,18	0	101105	101105	5,18
3		Hispanic American	0	0	0	0	0	0	0	0
4		Native American	0	0	0	0	0	0	0	0
5		Total Minority Male		101106	0	101105	0	101105	101105	5,18
6	Minority Female	African American	15000	0,77	15000	0,77	0	15000	15000	0,77
7		Asian Pacific American	0	0	0	0	0	0	0	0
8		Hispanic American	0	0	0	0	0	0	0	0
9		Native American	0	0	0	0	0	0	0	0
10		Total Minority Female		15000	0	15000	0	0	15000	15000
11	Total Minority Business Enterprise (MBE)		116106	0	116,105,0		0	116,105	116,105	5,95
12	Women Business Enterprise (WBE)		0	0	0	0	0	0	0	0
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		0	0	0	0	0	0	0	0
14	Disabled Veteran Business Enterprise (DVBE)		0	0	0	0	0	0	0	0
15	Persons with Disabilities Business Enterprise (DBE)		0	0	0	0	0	0	0	0
16	8(a)*		0	0	0	0	0	0	0	0
17	Total Supplier Diversity Spend		116106		116105		0	116105	116105	5,95
18	Net Procurement**		\$			1,951,232				
19	Net Product Procurement		\$			464,358				
20	Net Service Procurement		\$			1,486,874				
21	Total Number of Diverse Suppliers that Received Direct Spend									2

NOTE:

* 8(a) - Businesses owned and controlled by persons found to be disadvantaged by the U.S. Small Business Administration pursuant to Section 8(a) of the Small Business Act, as amended (15 U.S.C. 637 (a)) or the U.S. Secretary of Commerce, pursuant to Section 5 of Executive Order 11825 (GO 156 Section 1.3.13).

** Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.

Direct - Means Direct Procurement; when a covered entity directly procures from a supplier.

Sub - Means Subcontractor Procurement; when a prime contractor, in contract with a covered entity, procures from a subcontractor to fulfill its contractual obligation(s).

% - Percentage of Net Procurement.

DESCRIPTION OF SUPPLIER WORKFORCE

Great Oaks procure and purchase office, shop, maintenance supplies and all other parts and services from various local and non-local supplier to run the day to day business operation of the company. In 2024, our largest spends were associated with storage tanks repairs and maintenance expenses and software subscription expenses.

DESCRIPTION OF SUPPLIER WORKFORCE

In 2024, Great Oaks partnered with two diverse suppliers identified from the Supplier Clearinghouse to provide consulting services in engineering and management. Great Oaks' total spend with the two diverse suppliers was \$116,106.

SUPPLIER DIVERSITY RESULTS IN POWER (ENERGY PROCUREMENT)

NOT APPLICABLE

SUPPLIER DIVERSITY RESULTS IN FUEL PROCUREMENT

NOT APPLICABLE

DESCRIPTION OF ESTABLISHED SUPPLIER DIVERSITY GOALS FOR THE PREVIOUS CALENDAR YEAR

Great Oaks's reporting requirement began with fiscal year 2022, with the first report due September 2023. TDA has provided Great Oaks with recommendations for goals starting in 2025. The recommended goals will be discussed with leadership before the end of the 2nd quarter of 2025. We used the years 2023-2025 (3 years) as our test years and the three-year average to determine goals for 2026 and beyond. This is the best method as these years will include the tail end and beginning years of rate cases as account for higher and lower dollar net procurement.

Supplier Diversity Results Compared to Set Goals

Supplier Diversity Annual Report						
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Greaat Oaks Water Company				2024		
Supplier Diversity Results Compared to Set Goals						
Category		2024] Result %	2024 Goal %			
Minority Business Enterprise (MBE)		5.95	2			
Women Business Enterprise (WBE)		0	1			
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		0	0.5			
Disabled Veteran Business Enterprise (DVBE)		0	1			
Persons with Disabilities Business Enterprise (DBE)		0	0.5			
Total		5.95	5			
NOTE:						
% - Percentage of Net Procurement.						

DESCRIPTION OF BARRIERS TO SUPPLIER DIVERSITY

While Great Oaks has made a significant improvement in its diverse spend in the second year of its implementation of the program, it continues to face “early stage challenges” as internal stakeholders need a more communication and education throughout the year to be fully made aware of the importance of supplier diversity. Great Oaks is committed to providing a more consistent communication to all stakeholders with a pro-active approach throughout the procurement process.